



High-Profile Information Technology Project Status Report

Department: Revenue

Project Name: WINPAS - Rollout 12

Business Sponsor: Diane Hardt

Date of Report: 06/26/2015

Reporting for Quarter: 6/30/2015

Project Start Date: 08/01/2014

Planned Implementation Date: See note below

Estimated Project Cost: \$1,300,000

Amount Provided Through Master Lease: None

Project Description – Enter a brief description of the project, including the business case for it and its major deliverables.

This project is the 12th rollout of DOR's Wisconsin Income Processing and Audit System (WINPAS). This rollout will migrate processes related to the states Unclaimed Property program into WINPAS. Currently, the Unclaimed Property program is considered a "silo," running separately on a system called WAGERS and is not integrated within the department's primary tax processing system referred to as WINPAS. WAGERS is used by Unclaimed Property staff to process claims, holder reports, and safe deposit box inventory. This project will migrate these processes into WINPAS in order to increase operational efficiencies by using existing WINPAS functionality such as reporting, task queues, billing, payments, revenue accounting, case management, work indicators, mail scanning and the data warehouse.

The rollout has been broken into a two phase implementation approach - with Phase 1 implementation date of 03/09/2015 and Phase 2 implementation date of 06/08/2015.

Project Funding – Please describe all sources of funding for the project, which should add up to the estimated project cost cited above.

The Project funding has been made available through the Unclaimed Property PR fund.

Project Status – Determine the status for the Schedule and Budget categories below based on the guidelines on the right and described in more detail on page 2 of this document.

Insert an X in the column that best describes the status of the category. Add comments for that category as needed.

Additional comments are not required if the status is Green, but if a category has a status of Yellow or Red, describe the issues or problems and what actions the agency is taking to address them.

STATUS COLOR INDICATORS	
Green	On target as planned
Yellow	Encountering issues (e.g., Schedule or Budget over by 10% to 25%)
Red	Encountering problems (e.g., Schedule or Budget over by 25% or more)

Project Status Categories

Schedule Status

During the second quarter of 2015, the training and deskside support of unclaimed property staff concluded and the monitoring of production input and output in a controlled production state has concluded. All Phase 2 functionality has been implemented. Rollout 12 activities have been completed.

This will be the FINAL dashboard report for this project.

Budget Status

Green	Yellow	Red
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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WI DEPARTMENT OF ADMINISTRATION
DIVISION OF ENTERPRISE TECHNOLOGY
DOA-10111 (R09/2014), PAGE 2

Summarize Any Completed Major Tasks or Project Phases:

Phase 2 Completed - deskside support/training and controlled production has been completed.

Major tasks for Phase 2 that were implemented include:

- 1) Handling of auctions
- 2) 1099 issuance for year end
- 3) Contract Audit related activities
- 4) Data matching and automatic claims and/or notices
- 5) Offsets against other debts

Rollout 12 - WINPAS - Unclaimed Property has been implemented.

Summarize Any Significant Project Changes Affecting Schedule, Budget or Scope:

For each change, describe what the change involved, when it was approved, and the reasons behind the approved change.

None.

Additional Comments or Issues (optional):

If you have any additional overall status comments about the project (e.g., project news, accomplishments, emerging challenges or risks that could affect the project), please provide them here.

Project Status Category Guidelines**Schedule Status**

Green – Indicates that the project or phase is on track for the targeted implementation date.

Yellow – Indicates that the project or phase may be falling behind and analysis needs to be done to determine if

Project Status Category Guidelines
the project can recover and still achieve the targeted implementation date, or if adjustments must be made to that date. Red – Indicates that the project or critical tasks <u>have fallen behind</u> schedule, and corrective action must be taken to still achieve the targeted implementation date or that date must be changed.
Budget Status Green – Currently on target with project budget. Yellow – Project is over budget by 10 to 25%. Red – Project is over budget by 25% or more.